esri UK

From surviving to thriving:

How real estate leaders are reimagining the future

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TechPros.

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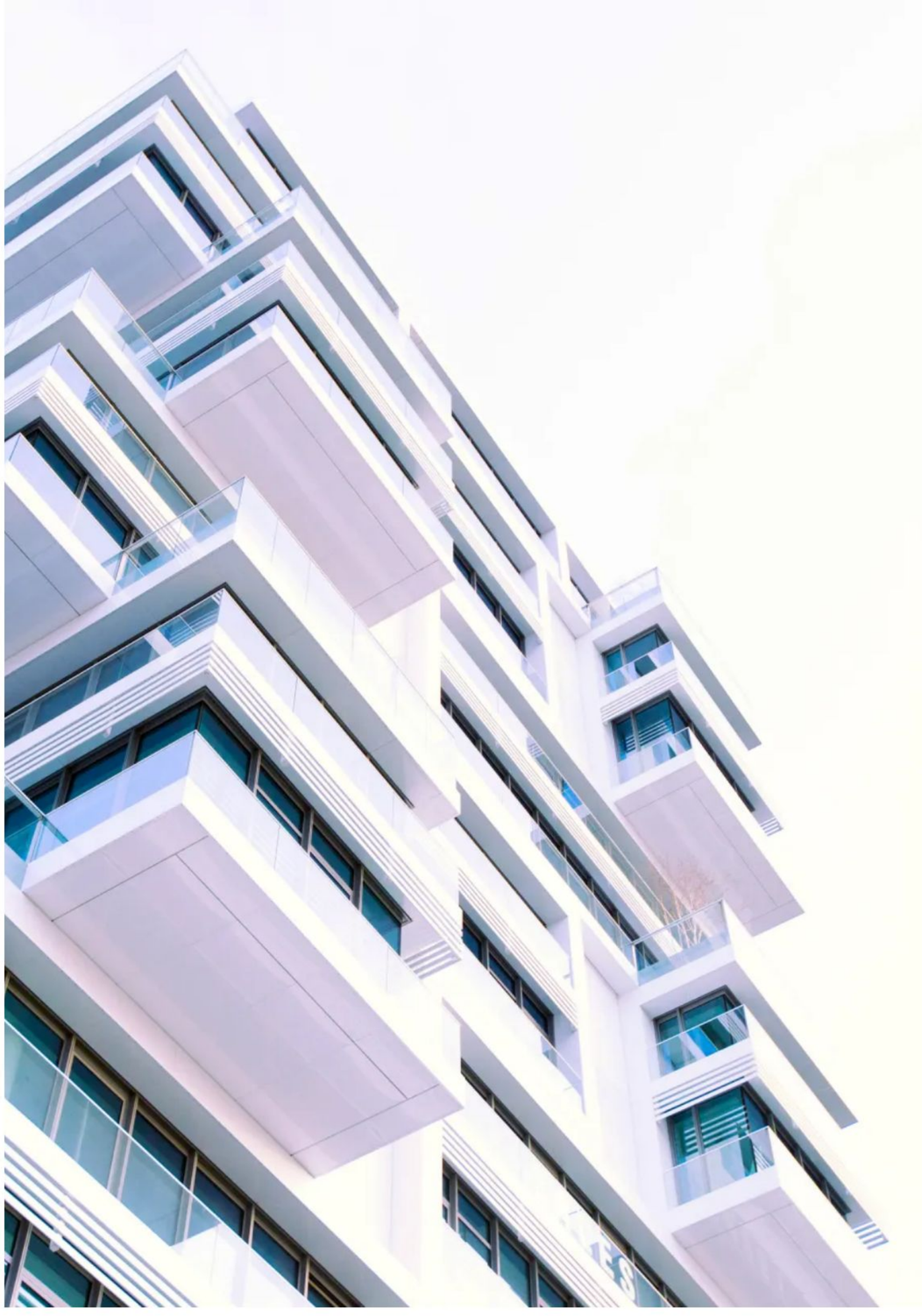
Introduction



In Q1 2020, the commercial real estate sector had quite a lot on its plate: moratoriums on rent, large areas of cities going quiet due to lockdowns, and major debates sparking about the very future of the office.

A time of stress and disruption, for sure. At the same time, other voices on the question of 'People, Planet and Profit' were also beginning to be heard across the sector, with debates over sustainable building and creating a greener urban habitat getting louder.

To help find answers, TechPros carried out a survey of UK-based Land & Property practitioners to get their views on these issues. We carried out the research with the support of Esri UK, a global software, data and services company that provides digital mapping and location analysis technology to leading real estate businesses around the world.

This eBook is the result. It aims to combine the insights of practitioners working at the frontline of all this change with Esri's deep knowledge of the emerging potential of GIS (Geographic Information Systems) as a way to make location the new secret weapon for practitioners to rise to the challenges.

We are very grateful to all the Land & Property sector professionals who gave their knowledge and insights for us to draw our conclusions. While over 30 market participants were interviewed and their views captured, this final report is based on the perceptive remarks of the following five key players in the UK commercial real estate market.

TechPros and Esri UK
April 2021

Anthony Lorenz
Senior Partner, The Lorenz Consultancy

With over half a century of experience, Mr Lorenz is Senior Partner at The Lorenz Consultancy, one of the leading niche property consultancies in the country and a specialist in commercial property acquisitions, disposals, rent reviews, lease restructuring and renewals, dilapidations and general asset management throughout the UK.

lorenzconsultancy.com

Alex Tross
Director, Head of Office Advisory, Lambert Smith Hampton

Alex Tross is Director, Head of Office Advisory, Lambert Smith Hampton, one of the UK's leading UK commercial and residential real estate consultancies. Alex is a Chartered Surveyor with a proven track record of advising on the acquisition and disposal of office space on behalf of landlords and tenants in Birmingham's central core and wider West Midlands area.

lsh.co.uk

Chris Marriott
Associate Director, The Instant Group

Chris Marriott is an Associate Director at The Instant Group. Instant rethinks workspace to enable agility and operational resilience for businesses of all sizes from inception through to delivery and management.

theinstantgroup.com/en-gb

Michael Crawford
Head of Technology, Colliers International

Mr Crawford is Head of Technology at Colliers International, a Canada-based diversified professional services and investment management company. There, he is responsible for driving innovation through research and development (R&D) activities in the PropTech market and leveraging emerging technologies to bring the newest innovations to Colliers's UK clients.

colliers.com/en-gb

Stephen Toal
Director of Property Management Research, Savills

Stephen is Head of Property Management Insights at Savills. He works closely with Savills' property management team across the UK providing retailer analysis, occupier auditing and visitor profiling. He has over 20 years' experience in the Research sector.

savills.com

Next: Chapter 01

What has been the short and long-term impact of the COVID health crisis on the UK real estate ecosystem?

Keep reading →

1 Chapter One

What has been the short and long-term impact of the COVID health crisis on the UK real estate ecosystem?

How has the extended periods of pandemic disruption and uncertainty affected the UK commercial real estate market?

We asked respondents, 'Has the 2020 health crisis meant the end of the traditional UK commercial property business model?'

The group was evenly divided, but by the slimmest of majorities said they agreed. Indeed, many warn that some kind of reckoning as a result of business being on hold for so long can be postponed, but not evaded. However, such restructuring could bring many positive benefits, some were quick to add.

Lorenz Consultancy's Anthony Lorenz warns that we do need to acknowledge that the damage runs deep. "From March 2020, many tenants haven't been paying any rent at all, and that will go on until June 2021 because the government has extended the moratorium," he reminds us. "But at some point, tenants are going to owe their landlords up to a year and a half in rent, which may be unaffordable, and that's when they will be looking at ways of dealing with that debt. I also believe that the vacancy rate of Central London offices could end up at around about 15%, which is worse than the 2008 financial crash which was closer to 8%."

All this means at least some disruption, for which the market needs to be ready: the question is whether it will be a short-term or a long-term disruption. "Landlords just won't have the same levels of income coming in, especially from Retailers, and Hospitality tenants," he goes on. "We are not going back to normal; we are going back to a new world where the mentality of people has changed, as well as the financial ability to pay the old level of rents." Stephen Toal, Head of Property Management at Savills, echoes the warning: "Landlords will have to adapt to the fact that, in the short to medium term, there may be reduced demand for office space in certain locations."

For commercial property the immediate impact of coronavirus clearly left London, particularly the City, "a ghost town", Anthony Lorenz adds. To make those office blocks virus-safe for Recovery will also bring disruption: "There are challenges within even brand new buildings, such as capacities around the lifts and getting people up to high floors," he warns.

Disruption, however, could also equal opportunity: a UK property market crash could mean a lot of property coming onto the market cheaply, all at once. "From a purely office-related perspective, yes, COVID's going to throw up some opportunities," notes Lambert Smith Hampton's Alex Tross, Director, Head of Office Advisory. "I think ultimately we will end up with much more interesting office environments as a result."

Stephen Toal adds, "this will hopefully drive innovation and a new paradigm, from which ultimately the sector will benefit."

The Instant Group's Chris Marriott, Associate Director, Client Solutions, goes so far as to predict something of a post-COVID boom in the sector: "Businesses vacated their office space almost overnight yet were able to maintain productivity and performance whilst most staff worked from home. This shift has forced almost all companies to reconsider the role the office will play in the future, accelerating the demand for flexible solutions whose versatility will help companies to adapt to the new way of working."

There could be a lot of interesting work re-making office space. There could also be some big changes coming in the social dynamics of UK cities, many believe. Anthony Lorenz predicts Central London rental costs could drop by as much as 10%, which could potentially open up the market for residential to become more of a city centre factor than it has for generations, for instance: "I envisage in the longer term people returning to live in surplus redundant offices, subject to planning, in the likes of Soho, Covent Garden, the City and even Canary Wharf, as long as the buildings can be converted to residential."

Chapter takeaways:

1. The current health crisis is driving rapid change to the UK commercial property sector business model.
2. Nonetheless, there could be significant potential benefits, including more interesting and engaging office spaces.
3. Widespread residential property mixing could become more of a factor, with some office space being converted.

THE ESRI UK PERSPECTIVE:

"There's little doubt that COVID has affected the real estate industry, both in the short and long term, especially the direct relationship between brokers and clients.

"However, some have responded early to the crisis by overhauling their traditional ways of working. Our client Cushman & Wakefield, for example, seized the COVID opportunity to transform engagements using virtual workspaces, virtual viewings, even virtual street tours, using advanced simulation technology to accelerate sales engagements and keep up with client demand.

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Next: Chapter 02
People, Planet and Profit: In terms of future growth, should the Real Estate sector pay equal regard to all three?

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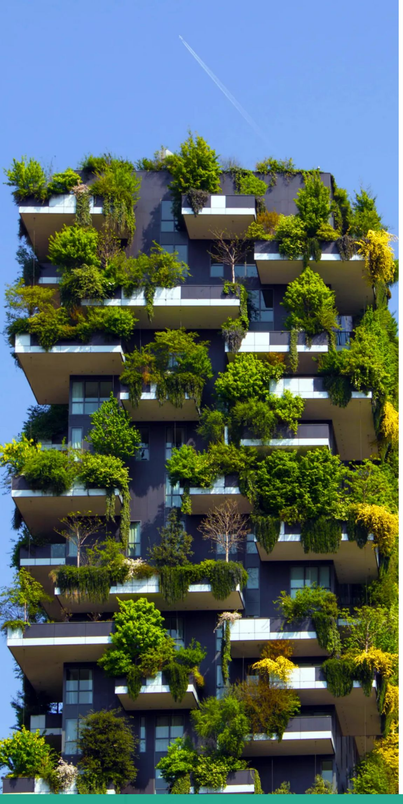

2 Chapter Two

People, Planet and Profit: In terms of future growth, should the Real Estate sector pay equal regard to all three?

We asked how the drive towards greener buildings and sustainable urban environments is changing the industry. Sustainability in this broad sense meaning a balanced approach of social wellbeing and equity, environmental stewardship and economic prosperity. Our interviewees provided a fascinating insight into a sector that is highly aware of the issues here, acknowledging this is the general 'route of travel', but which is still puzzling a little on the details.

"Colliers takes sustainability very, very seriously, and has done for many years," states **Michael Crawford, Head of Technology, Colliers International.** "One of the key areas that we are operating very heavily in is Environmental, Social, and Governance, and a lot of companies will be working towards these targets in the near future."

"There are real debates about whether this is an environmental or a humanitarian issue (or both), but sustainability is fundamentally important," states **The Instant Group's Chris Marriott.** "We're seeing a big push from clients, particularly in city centres, for our real estate solutions to be environmentally friendly: increasingly, our clients challenge us with this as part of their requirement, to ensure they are meeting and exceeding ESG goals."

There are some who remain sceptical as to how easy the sector will find meeting this demand, however. "The issue of sustainability is now impossible to ignore," **Savills's Stephen Toal** points out. "Commercial organisations need to balance the need to turn a profit with managing their environmental obligations and there are still some organisations that will champion sustainability, provided it doesn't cost too much – this mindset needs to change."

Also, less convinced for now is **Lambert Smith Hampton's Alex Tross,** who declares, "I don't think you can square the circle; I don't think the sustained growth that markets want to see can happen without exploitation of some parts of that ecosystem. For sustainability to be real, the whole system would have to be reworked, and I don't think anyone's prepared for that."

There are still some organisations that will champion sustainability, provided it doesn't cost too much - this mindset needs to change.

Stephen Toal | Head of Property Management at Savills

Not everyone agrees such fundamental questions are waiting to be worked out. **Stephen Toal** suggests that the sector will probably start to become more ecologically responsible if the early steps are made as pain-free as possible for it. "I get the feeling sometimes that we will be sustainable provided it doesn't cost us too much money or penalise us too hard," he expresses.

Still, some doubt there will be much more than a certain amount of 'Greenwashing' on this front for some years to come: "We might tinker at the edges, and there might be significant carrots to make people focus on things like Greener buildings," **notes Alex Tross.** "But if it remains very expensive to build a building in a sustainable way and it impacts on that investment, all the shareholders would have to agree to accept a low return for a greater good from which they don't necessarily directly benefit."

Ultimately, though, the market is already voting with its feet on the 'People, Plant, Profit' conundrum. "On sustainability, the majority of medium-sized or smaller companies don't care so much," agrees **Lorenz Consultancy's Anthony Lorenz.**

"But for the medium-sized to large companies, sustainability is a high priority issue, where they will favour energy-conserving buildings. This becomes an issue for planning advisors and architects to create buildings, which satisfy such demand.

Chapter takeaways:

1. As an industry, real estate is a possibly a little behind the curve on adopting a sustainable mindset.
2. Increasing demands on the sustainability agenda from clients and consumers are likely, however, marking a shift away from a singular focus on profit to a more balanced focus incorporating Environmental, Social & Corporate Governance (ESG).
3. The ability to measure, analyse and report ESG metrics on portfolios may become a core sector capability and competitive commercial real estate brand differentiator in the short term.

Landlords who do not do green and sustainable buildings will not be at the front of the queue on letting.

Anthony Lorenz | Senior Partner at The Lorenz Consultancy

THE ESRI UK PERSPECTIVE:

There's a fascinating debate in the sector around the challenge of sustainability. In many other sectors, intriguingly, sustainability is fast becoming a driving force for investment and market growth. There are many challenges to rewiring mindsets and overcoming traditional ways of working, but given the strong social and market pull towards sustainable solutions, this seems set to be an on-going area of major focus.

What's also striking is when asked whether sustainability represents the biggest business opportunity to the industry in a generation, the answer was overwhelmingly positive, at 7.3 out of 10 – so the immediate challenge is how to leverage this opportunity quickly and meaningfully.

Early movers on this growth initiative include Uppsala – Sweden's fastest growing city, that has already joined the dots on people, planet and profit in the design of an entire city district using 3D urban modelling tools and an interactive mapping website to engage with clients and citizens.

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Next: Chapter 03
City centres: dying—or evolving?

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3 Chapter Three

City centres: dying—or evolving?

Our respondents rejected any idea that the city centre is 'dying'. When asked if the death of the city centre was being exaggerated in current discussions, we found that the majority agreed.

Indeed, none of our respondents see the inherent attraction of the city centre ending anytime soon. "No, the city centre is not dying; it will always be the central hub of everything, where millions of people go to work," affirms Colliers International's Michael Crawford. "Just because we've got a short-term crisis doesn't mean that mid-term and long-term, everything won't improve and grow."

Head of Property Management at Savills, Stephen Toal agrees, adding, "I do believe that we are in a temporary situation."

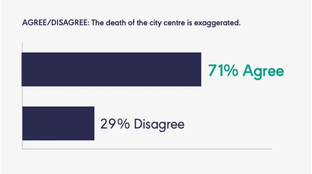
"People want to be in city centres, because there isn't that supporting infrastructure and amenities in a retail or a business park," notes Lambert Smith Hampton's Alex Tross. "Because of that broader appeal, no-one's building business parks because they aren't as attractive an investment as city centres: mixed-use residential, retail, leisure, the night-time economy—all those things that come together to make it an appealing offer. A fantastic office is one thing, but a city centre is different to a business park because it has all that supporting infrastructure."

True enough—but maybe the city won't see the same faces every day, the way it used to. "Do I think we will see the whole of the population working five days a week in city centres? Certainly not in the short term. However, people will always gravitate towards city centres as they provide a wider range of options for both living and socialising," notes Stephen Toal.

"Of course, a reduction in office-worker footfall will have a significant impact on the city centre. But it won't kill it off," adds The Instant Group's Chris Marriott. "London may have been temporarily put to sleep, but following June 21st, it will soon wake up."

London does seem to be a special case. Practitioners expect London to emerge pretty strongly from our current difficulties, blessed as it is with certain inherent structural factors like its place in the global economy. Michael Crawford speaks for many when he promises, "I think it will be business as usual, and very quickly, once this is all over."

Yet many also acknowledge the changing dynamics of city centres and their surrounding areas. "Over the last 5 to 10 years, there's been lots of talk about the problems of commuting to work and talking about creating new living/working areas outside the traditional model," Michael Crawford points out.



Source: Esri UK/Techpros survey

> The evolving dynamic of the city has been on the cards for many years, and maybe COVID might have sped up the process, and some people will have got used to working at home more. But I think predominantly life won't change—it will revert back to normal, as I think physical interaction is still something that, as human beings, we need.
>
> Michael Crawford | Head of Technology at Colliers International

"When you commuted to a city—and that's any city, not just London—as you were going about your daily business, to coffee shops and restaurants and bars, and so on, what wasn't apparent, I think, is how those businesses were so dependent on that professional services footfall," states Alex Tross. "So when you take that out of the equation, it's not only the impact on offices, but also on the businesses that rely on people that populate those offices. I think that's one thing that's coming into a very sharp focus now."

Stephen Toal adds, "The occupier will want to be much more in control of what their office environments look like, and businesses will in turn be more concerned about productivity as well as protecting their workforce: it's not just about coming in from nine to five, five days a week, it's about how we facilitate a better environment, which ultimately will both impact positively on the bottom line and get people to feel more comfortable, more energised and motivated to work."

"There are different types of people in business and we will probably look at which teams need to commute so much; like finance teams, do they all need to be in the same room at the same time?" adds Michael Crawford.

Change is certainly on the horizon, then. And we'd better be ready for it. For Stephen Toal, "We are likely to see an evolution in both offices and city centres; however these environments will need to work harder to encourage workers to get in a car or get on public transport to go into work on a more regular basis. For the office, there needs to be a sense of comfort, safety and general wellbeing to help employees remain productive. For city centres, there will have to be more than just a group of shops or bars to encourage people to spend their money."

Should we feel nervous or apprehensive about such change? The market participants we spoke to for this eBook actually sense the pandemic's impact could be long-term positive.

"The British city centre's been wrecked over the last 30 or 40 years by landlords doing the same old thing, all over the country," points out Lorenz Consultancy's Anthony Lorenz. Most shopping centres rely on the same anchor tenants, with the likes of C & A, Marks and Spencers, John Lewis and House of Fraser. These shopping centres occupy a massive amount of space, normally right in the middle of town, approached via the High Street. "This is all going to change; where mixed use development including Leisure, Hotel and Residential space will bring footfall to the centre again, and that former big shopping centre will become a place of entertainment and for community use instead."

Envisage a former shopping precinct with a football pitch in the basement, or space for the Arts, with such mixed use environments being designed to be much more interactive: "These new kinds of city centres won't be designed with straight alleyways but as labyrinths, that visitors to the centre pass as many retail units as possible, and there could even be a zoo in the middle and a funfair which attracts the kids, who then bring their parents along. The future of the city centre will be based on reconfiguration, towards what we used to have."

To get there, he predicts, a whole new commercials and contracts era will have to be ushered in, featuring many new forms of flexible letting terms and price-points. A fascinating picture of a very changed landscape; will it come true? We may know very soon.

Do we all need to be in the same office at the same time?

Not everyone will emerge from Lockdown as a fan of continuous Zoom meetings, the group concurs. "When I'm at home, I'm more productive in some aspects, but less productive in others," says Michael Crawford. "Your children will walk in on you in a business meeting now because they have no barrier, or something will disturb you because you're at home. As well as all that, working from home is just a different atmosphere from the office, and you have to worry if you're as efficient with team members and so on."

Chapter takeaways:

1. Work/life behaviours are changed forever: portfolio advisors are investing time to re-imagine their stock to meet changing consumer habits.

2. City centres will continue to succeed if their design takes account of new working patterns.

3. Re-imagining cities and property use becomes easier when you visualise and model actual human behaviour and movement in real physical/urban space.

THE ESRI UK PERSPECTIVE:

> Our results show how the 2020-21 pandemic has resulted in changing demands for property use in cities—but also how they remain an area ripe for on-going investment. Key to this is the ability to re-imagine the space. In 2017, for instance, Knight Frank released its Skyward report identifying thousands of square feet of development potential across London without changing the skyline.

> During 2020, this digital mapping analysis was used again in the London Borough of Southwark to surface 2,000 viable new rooftop homes. This sort of innovation in location-based research and insight is definitely helping to keep cities alive, enabling them to survive and even to thrive.

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Next: Chapter 04

Can technology help the sector transform to meet changing client requirements following the 2020-21 COVID crisis and on-going climate crisis?

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4 Chapter Four

Can technology help the sector transform to meet changing client requirements following the 2020-21 COVID crisis and on-going climate crisis?

We found the UK real estate and property market being open to the possibilities of technology, seeing its potential–but that adoption rates remain uneven. The context here: the sector has something of a reputation for not embracing technology as aggressively as other parts of the economy.

For example, we asked if easy access to government data, as well as data about the built environment and human movement, would currently be deemed essential to their business practice. The answer averaged a notably high 7 out of 10.

"Ultimately, we're limited in real estate, because what you're dealing with is a bricks and mortar physical asset," says Lambert Smith Hampton's Alex Tross. "There is only a limited amount of tech that you can apply to that and how you occupy the space. But in terms of how you access it, how you market it, all the peripheral services that impact on the viability of your new development, I think all those aspects will absolutely be impacted by digital."

When asked if improving data management and reporting will be essential to the success of business transformation strategy: the verdict was an average of 8.3 out of 10.

"When I started in the 60s, we had to make seven or eight calls to agents to get comparables on rent reviews and lease renewals," notes Anthony Lorenz. "Nowadays, you can pick this up online, and even download leases. Data is key to our market, and also assists occupiers in choosing the demographics of where they can relocate to, study the quality of space, employment costs, and makes relocation far simpler."

"I'm a huge fan of data, because it informs the decisions I make and it means I am lowering the risk curve in the advice I give, because I'm not guessing, I'm knowing," Alex Tross confirms.

But even something like specific location data, cautions Anthony Lorenz, is never the sole determining factor in a property dialogue: "Let's say we were dealing with a bank, and they think they want to have an office in Glasgow, and we think they should have it in Birmingham: they would have gone into the data to look at employment costs, et cetera. But we can suggest they think of Bristol, because it's a lot cheaper than both, and then they can immediately look at the data in Bristol and either knock it on the head or say that's a potential location. Data is a very, very important backup.

A growing appetite for real-time location data.

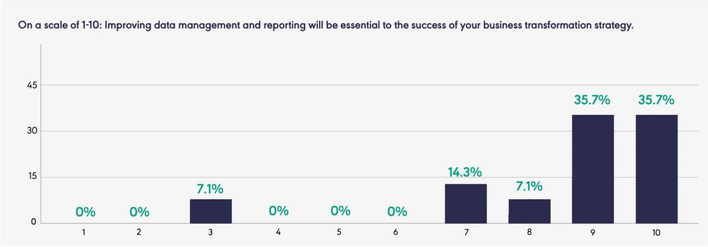
At the same time, some are going against the stereotype and claiming their whole proposition is already informed by data and tech.

"Where we really differentiate ourselves as a business is with our rich data set, because we have been transacting in the flexible real estate market for 20 years," says The Instant Group's Chris Marriott, for example. "It's how we help our clients to negotiate the best deals, to assess their portfolios to look at where we can inject some flexibility and agility. We have all sorts of different scenarios that we can play through with clients; they can overlay their information against our data, and almost immediately, you can start to see where the possibilities lie in terms of our solutions. We are massively data-led as a business, and I think that's what companies need now in terms of finding their solutions."

There may well be a COVID factor driving greater digital uptake in all this. "In 2018, people were talking about this, not much happened in 2019; it was supposed to happen somehow between now and 2023," says Colliers International's Michael Crawford. "But COVID's massively accelerated the need for technology and data, and in real-time. In terms of technology in British real estate, I think we're seeing a much greater increase in adoption, and real-time access to data about your portfolio is number one in my opinion, but not enough people across the whole of the industry are doing it."

"Without a doubt, having real-time, live information that's easily accessible will always be sought after," adds Stephen Toal. "Our aim as business is to provide our key stakeholders with timely, relevant information in an easily accessible format. Not data for data's sake."

Ultimately, the UK property sector is extremely conscious about the way the world is heading. "Any business that doesn't embrace tech is ultimately doomed," Alex Tross concludes. "We've seen that with retail, where every day there's a story about a firm that's failing, and when you look at the details tend to be those that haven't embraced online."



Source: Esri UK/Techpros survey

Chapter takeaways:

1. As an industry, UK commercial real estate is looking for new technologies to transform and accelerate workflows and engagement methods.

2. High adoption rates can be achieved if apps are tailored to specific workflows, easy to use, and provide accurate up-to-date information.

3. Location data continues to underpin almost all real estate transactions. In parallel, location analytics is proving a key capability differentiator for some providers, although its distinct contribution is not yet widely acknowledged as being critical to growth.

THE ESRI UK PERSPECTIVE:

"There's a growing list of leading real estate companies acknowledging that location technology is the key to accelerating time to insight – which is critical for growth, opportunity, and competitive advantage. Local market knowledge can be enhanced with near real-time data to enable better informed, faster decision making, for example.

"Savills has been a leading light in this sort of technology transformation: its Knowledge Cubed platform aggregates relevant real estate information into one convenient place while also leveraging the power of AI (Artificial Intelligence) to extract information from leases, contracts and other documents. This is allowing the company to help clients stay ahead of existing and emerging opportunities and to optimise their real estate portfolio with visualisations of current outlook data, labour analytics and tenant/landlord conditions.

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Next: Further Thoughts

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Further Thoughts

With travel restrictions during the pandemic we've seen some interesting things with tech which we expect to become embedded long-term. Such as supporting the building inspection and transaction process or improving the development and management of assets to meet modern sustainability and wellness standards.

Damian Harrington

EMEA Head of Research, Colliers International

Allied to the general growth of online is the growth in associated data and the increased requirements for storage there is a natural requirement for more data center capacity, and looking at the future there will be even more needed with 5G deployment.

Stephen Hall

Executive Sales & Marketing Director, ARK Data Centres

UK manufacturing is starting to grow again after Brexit. Around 700,000 new businesses start up every single year in the UK and I think that will continue to grow. These businesses that keep the UK economy going will stay right where they are.

Emma Long

Managing Director, BizSpace

Access to data is critical and we need the ability to utilise platforms for information gathering or sharing 24/7. The current shift to working from home has blurred the lines of the conventional working day, rightly or wrongly. There is much less 9-5 definition with more people having to work around other demands on their time throughout the day.

Lynn Haime

Partner, Head of Liverpool office, Matthews & Goodman

In this era of uncertainty, businesses require flexible real estate solutions. It is no longer viable for businesses to shoulder the burden of building out and managing spaces themselves. There are premium returns available to landlords who can deliver flexible, end-to-end solutions that are tailored to customer needs and expertly managed on their behalf.

James Nicholson

Partner, Knight Frank

There is still a resistance to the sharing of data, but ultimately if the industry does not keep up there will be a prop-tech business that will dominate and disrupt.

Mark Gilbert

Head of IT, BizSpace

Next: Biographies

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Biographies

Damian Harrington, MRICS

EMEA Head of Research, Colliers International

Damian is a Regional Director and Head of EMEA Research for Colliers International. He has worked within the real estate profession for over 25 years, living and working from a variety of locations across EMEA, gaining a deep understanding of European property markets along the way.

Emma Long

Managing Director, BizSpace

Part of the BizSpace family for 17 years, Emma has significant experience working across large, multi-site organisations and a strong track record in leadership, project management and implementing change. In recent months, she has been instrumental in ensuring the safe-working guidelines are implemented across the company's sites nationwide.

Helen O'Reilly

UK Head of Marketing & Digital, Colliers International

Joining Colliers in 2016, Helen is passionate about technology and digital marketing. Her focus is on applying technology solutions and digital marketing strategies to drive lead generation and raise the profile of Colliers in the UK. In 2019 she was appointed to the board of the UK PropTech Association.

Howard de Souza

Head of Marketing & Business Development, Matthews & Goodman

Howard has almost 10 years' experience of the property market having worked across all sectors – from commercial to agri. Having started life in a strategic marketing consultancy, he now works with specialist teams to try to understand the causes, drivers and outcomes which influence decisions and decision makers.

James Nicholson

Partner, Knight Frank

James advised occupiers for the first ten years of his career, aligning their real estate with their business needs. For the last five years he has worked with landlords, to rethink their product and service offer to meet changing customer requirements. James is the lead Knight Frank partner for 'Yours', a joint venture with Work.Life, which enables landlords to offer tenants plug and play spaces.

James Routledge

Partner, Matthews & Goodman

James is an equity partner of Matthews & Goodman property advisors. He provides cradle to grave advice, from working up property investment rationale, to sourcing and negotiating acquisitions, to overseeing property & asset management, strategic reporting and realising the investment through tactical disposals. Clients include fund managers, sponsors of property partnerships and private investors.

Lucy Watts

Executive Director, Operator & Landlord Solutions

Lucy leads Instant's Operator & Landlord Solutions business, providing insights and consultancy to operators, landlords, agents & investors globally. With over 15 years' experience and a wealth of industry knowledge, she previously lead the broking division working with both SMEs and large corporates, helping them to acquire office space worldwide.

Lynn Haime

Partner, Head of Liverpool office, Matthews & Goodman

Head of the Liverpool office and Partner at Matthews & Goodman, Lynn has over 20 years' experience, both client side and consultancy, in the letting and management of office, retail and leisure schemes across the North West.

Mark Gilbert

Head of IT, BizSpace

Mark has been the Head of IT since March 2017, leading, developing and managing all aspects of IT and Digital transformation within BizSpace. This includes providing strategic Digital advice to the business, overseeing IT governance, systems management and development, and systems application and support. Mark has an MSc in Business and Organisational Strategy and spent his early career in electrical and electronic engineering and production analysis.

Neil McLocklin

Partner, Head of Strategic Consulting, EMEA, Knight Frank

Neil is responsible for Strategic Consulting across Europe. He is particularly passionate about workplace strategy and change management, and has led major transformation programmes for companies that include BT, Deutsche Bank and G4S. He has worked with many Corporate Boards to help them achieve significant business enhancement through strategy.

Philip Gardner

Partner & Group Head of Strategy, Risk and Operations, Knight Frank

Philip is a Partner and the Group Head of Strategy, Risk and Operations at Knight Frank the world's largest privately owned property consultancy. Day to day responsibilities include managing risk across the group, leading on operational innovation and responsibility for the strategic planning function. He has an MBA from Warwick University.

Roger de Boehmler

Recent Partner, Knight Frank

Roger is a FRICS Chartered Building Surveyor and FIWFM Strategic Facilities Consultant, with more than 35 years professional experience within the property and PropTech industry. He has spent the past 5 years as a Partner at Knight Frank. His key achievements include providing technical auditing of projects up to £400m and providing technical due diligence for asset acquisition/disposal.

Stephen Hall

Executive Sales & Marketing Director, ARK Data Centres

Steve took on the role of Executive Sales & Marketing Director for Ark in Oct 2012. In the first year at Ark, he grew sales by 400% and revenue by 200%. He was previously the CEO of Crown Hosting, a highly successful Joint Venture with the UK Government. In a past life, Steve completed 19 years of distinguished service in Her Majesty's Royal Navy as an Aeronautical Engineer Officer.

Steve Cross

Director, Knight Frank

A Real Estate professional, working for some of the world's largest and complex organisations, designing and delivering innovative strategies that drive change, add value, improve user experience and manage risk. He is skilled at collaborating with key stakeholders and has worked across different sectors including Real Estate, Banking, Retail, Technology and Oil & Gas.

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Esri UK offers GIS solutions to a wide range of markets in both the public and private sector. Customers include CBRE, Carter Jonas, JLL and Savills.

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